

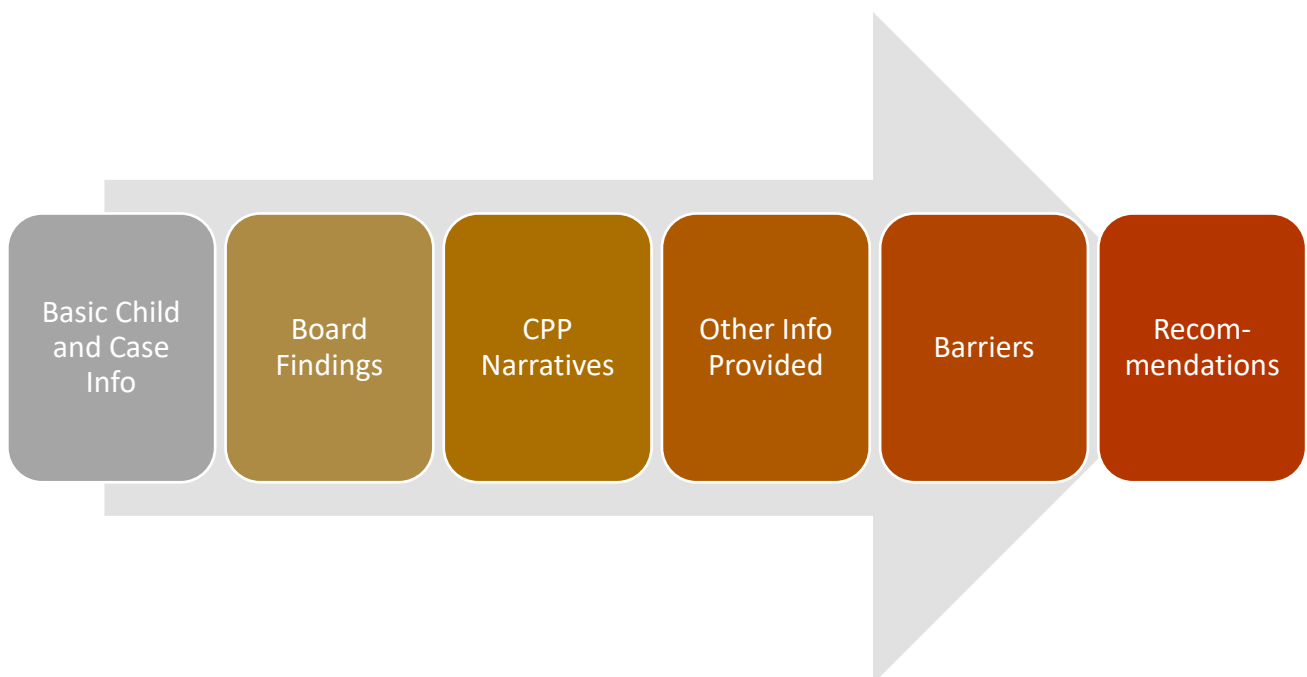
# FCRB Process and Report Writing



## Introduction

The purpose of this training is to provide FCRB facilitators with the information and knowledge needed to write reports for court. As changes are implemented to the FCRB process, the report template has also been revised. FCRB reports need to be concise, professional and add value to the juvenile court and case planning for children who are reviewed. This training will go over the changes that have been made to the FCRB report templates in regards to case type, findings, and barriers.

The flow of the report remains the same as follows:



It takes all of these components to make a complete review and report. The findings, narrative updates from testimony and identified barriers should all provide the basis for the Board's recommendations.

## Learning Objectives:

- To demonstrate understanding of the new FCRB templates to include new findings and barriers within each report.
- To identify at least 2 pitfalls to avoid when turning testimony into narratives for FCRB reports.
- To identify at least 2 best practices when writing the Board's recommendations.

## New Templates

Revised FCRB report templates will be implemented starting July 1, 2018. The purpose for the revisions is to provide case-specific findings, barriers and recommendations that better address the permanency goals for the children reviewed by FCRB.

There are three different templates. You will no longer use any reports pre-July 1, 2018 for reviews. Information from the prior reviews will need to be entered over into the appropriate FCRB template based on the case type:

- Reunification, Transfer of Custody or Guardianship
- Adoption
- APPLA

Report submitted on the old template will not be accepted by the editors.

Blank report templates will be available to all facilitators via a shared Google Drive folder.

## Board Findings

A significant change in the FCRB report templates is the removal of the Children and Family Service Review (CFSR) findings A-T. This is an area of the prior template that was open to interpretation by the Board and were not always answered according to the federal guidelines. Additionally, nothing was done with the information other than providing a snapshot of the findings in the Child Advocacy Board's annual report.



You will notice that some of the findings are the same in the three report templates but you will also notice that there are some very case specific findings the Boards are asked to make. Prior to the review, you will ask the Board to answer the findings and document the responses.

- **Any findings that are answered with a “No” or “Unknown” during prep discussion should:**
  - **prompt the LQ to ask questions during the review to address the finding;**
  - **have a comment under the finding to provide a reason for the “no” or “unknown” response; and**
  - **prompt a recommendation from the Board.**

## Turning Testimony into Narratives



As you know, during the review process the facilitator takes notes regarding the testimony provided by the Interested Parties present. Additional testimony may be available through recorded messages, emails, letters, youth statements or FCRB questionnaires.

As a facilitator, it is important to ensure that the Board Members ask questions and addresses the pertinent domains from the Case Permanency Plan provided for the review. As you take notes, you should be aware of areas that are missed by the Board Members and prompt them to ask questions to elicit updates for their consideration and will be included in the report.

## Incorporating Verbal Testimony

Depending on the number of interested parties in attendance, you may have a little or a lot of testimony to capture and then turn into narratives for the report. It is important that each person present for a review is given the opportunity to provide testimony and share information with the Board.



Parent Partners – per their program policy they should not participate in foster care reviews. Their role is to provide support to the biological parent. If they want to provide testimony, they need to be reminded that their program policy prohibits this practice.

Putative Fathers – a putative father is someone who may be a father but is not legally established as a parent until paternity testing is completed. FCRB will not be inviting putative fathers to reviews; however, a mother may bring him to the review. Confidentiality agreements and consent to participate should be executed before allowing a putative father to participate in the review. You may take testimony from a putative father but he will not receive a copy of the report as it contains confidential information about children that he does not have legal ties to.

Support Persons – A parent may bring additional support persons to the review. Confidentiality agreements and consent to participate should be executed before allowing a support person to participate in the review. You may take testimony and include it in the report but support persons will not receive a copy of the report.

### Pitfalls to Avoid

- **Writing narratives by the Interested Party** – multiple interested parties may share similar information or statements. When narrative is written into the report by the testimony of each interested party, the overall content of the report does not always flow for the reader. One person gives testimony about a variety of issues and then the next person shares testimony that conveys their perceptions and observations given their role in the case. Often times, there are similar statements provided or someone responds to what the prior interested party stated about a particular issue. Sometimes testimony conflicts so it is important to provide an accurate account of the information provided.

As the author of the FCRB report, it is important to convey the testimony in a way that makes the discussion understandable to all readers, especially those who were not present at the review.

### Resolution for one child cases:

- Group case issues and topics together to form a paragraph that contains the testimony provided by any interested party for the topic. Topics under a child well-being domain may include, but are not limited to: placement, school, behaviors, services, medical needs, etc. Each topic should have its own paragraph unless they are related issues.

### Resolution for sibling cases:

- Provide a narrative section by child first and ensure that topics flow and do not jump back and forth. Organize the report so that testimony for each child is conveyed.

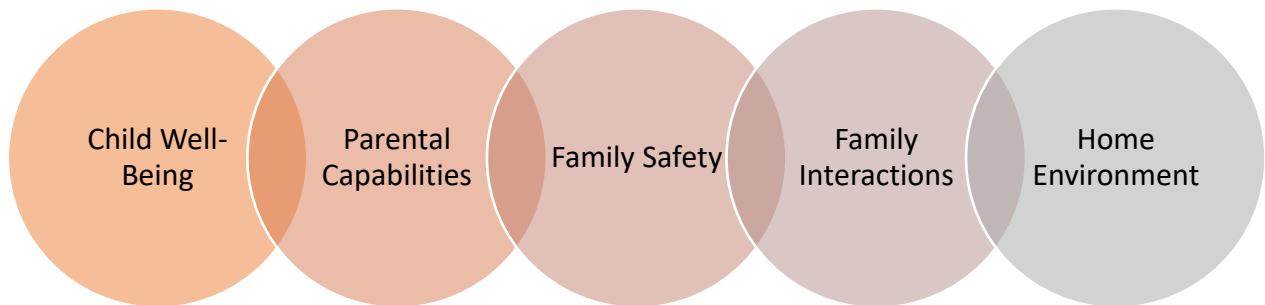
- **Overuse of the “reported” and “stated”** – not every piece of information provided by the interested parties needs to start with a phrase such as,
  - Jane Smith (DHS Caseworker) reported today...
  - Ms. Smith stated...

It is acceptable to include testimony (especially testimony that is the same from multiple interested parties) without identifying exactly who provided the information.

If there is testimony that you believe needs to be attributed to the person who provided it, then you want to include who made the statement. This helps the reader know who made the statement in the event in warrants some follow-up outside the review process.

### Resolution:

- Instead of only using “reported” or “stated”, use other words like “shared”, “added”, “conveyed”, “informed” or “described”. This will add variety to the flow of the narrative and not sound so repetitive in nature.



- **Misplacing testimony unrelated to CPP domains** – testimony should relate to the CPP domain.

Resolution:

- All information about the child, with the exception of visits, should be under the Child's Well-Being domain.
  - Parental Capabilities should address issues and services for the parents. Housing, employment, financial stability and transportation belong in the Home Environment domain.
  - Family Safety – this is often a difficult domain to have testimony for as Boards do not routinely ask if there is a safety plan in place and this is not commonly addressed by the Board; prompt the Board to address the domain at each review for non-TPR and non-APPLA cases.
  - Family Interactions – all testimony related to family visits and contact needs to be under this domain.
- **Repetition of testimony** – be cognizant of where you place testimony in the body of the report and avoid duplicating testimony in multiple domains. A common repetition is documenting testimony related to family visits; often times this is conveyed under the Child Well-Being, Parental Capabilities and Family Interactions.

Resolution:

- Same as above, ensure that all testimony documented in the report is pertinent to the CPP domain.

Consider the following paragraphs:

Suzy Smith (DHS Caseworker) reported that Johnny is struggling in school. He has an IEP for reading and behaviors. He sees a therapist once a week; it not known if he is internalizing anything from the sessions. Ms. Smith reported Johnny likes to play baseball and will participate in town league this summer. He takes medication and is due for a medication management appointment next month. Ms. Smith stated he doesn't like to do his homework and needs to work on his reading. She reported Johnny seems to be doing okay in his placement.

Tim Sullivan (FSRP provider) reported that he meets with Johnny once a week in his placement. He is behind in reading for his age. Mr. Sullivan reported Johnny doesn't like to do 20-minutes of reading each night for homework. The foster mother is working with him each night on his reading. Mr. Sullivan stated Johnny is doing fine in the foster home. Mr. Sullivan stated that Johnny tells him he doesn't like to go to the therapy sessions. He offers no other reason than he doesn't like it. Johnny is not doing well in school behaviorally. He has poor peer interactions and causes disruptions in the classroom because he is not focused. Mr. Sullivan reported the foster parents do not report any behavioral concerns outside of refusing the reading homework.

Jane (foster mother) reported that Johnny does fine in their home. She stated he gets along with the other children in the home. He struggles with reading and it causes some defiance when it comes time to do homework each night. His assignment is to do 20 minutes of reading each night. He enjoys sports and outdoor activities. She stated that he goes to therapy once a week but doesn't seem to get much out of it. Jane stated she is not sure what all they talk about in the sessions. She reported he is generally healthy and has a good appetite. He has a medication management appointment later this month. Jane doesn't know if Johnny's mom will attend the appointment with them. School conferences are next month and Jane stated it would be nice if his mother could attend.



Based on the pitfalls to avoid and resolutions that were just covered, how might you change these paragraphs to convey a more concise reporting of the testimony?

- Are there any duplicated statements?
- Overuse of the “reported” or “stated”?
- Repetition of similar testimony?



A revised documentation of the same testimony:

It was reported by those present today that Johnny is doing fine in his foster care placement. He is getting along with the other children in the home. He is generally healthy and has a good appetite according to Jane (foster mother). He enjoys baseball and outdoor activities. Plans are for Johnny to play town league baseball this summer.

Suzy Smith (DHS Caseworker) noted that Johnny is struggling in school. He has an IEP for reading and behaviors. It was noted by those present today that Johnny is having difficulty with reading; he is behind for his age. He often becomes defiant when it comes time to complete his nightly assignment of reading for 20 minutes. Jane works with Johnny nightly with his reading. Tim Sullivan (FSRP provider) stated Johnny is not doing well in school behaviorally. He has poor peer interactions and causes disruptions in the classroom because he is not focused. School conferences are next month and Jane stated it would be nice if Johnny's mother could attend.

Johnny is participating in individual therapy once a week. Mr. Sullivan stated that Johnny tells him he doesn't like to go to the therapy sessions. He offers no other reason than he doesn't like it. Jane also noted that Johnny doesn't seem to get much out of the sessions although she is not sure what all Johnny and the therapist talk about. He takes prescribed medication and he has a medication management appointment later this month. It is not known if Johnny's mother will attend the appointment.



## Questionnaires



Questionnaires will continue to be attached to the FCRB reports; however, there should still be a reference in the report noting that the Board reviewed and considered the questionnaire.

All questionnaires will be referenced under the section titled, **OTHER INFORMATION PROVIDED FOR TODAY'S REVIEW:**

Examples may include:

- The Board reviewed and considered the FCRB questionnaire submitted by Tom and Jane (foster parents).
- The Board reviewed and considered the FCRB youth questionnaire submitted by Jackson Myers.

While it may seem redundant to include a statement in the body of the report since questionnaires are attached to the report, it is important for the Judge to know what information was considered by the Board as they conducted the review and made recommendations.

A reference in the narrative of the report also acknowledges to the person who sent it that the Board did receive and review the information; and the questionnaire was not just attached to the report without review.

Another option is to handle Questionnaires like you would any other written testimony. The information is still entered under the section titled, **OTHER INFORMATION PROVIDED FOR TODAY'S REVIEW**; however, you may choose to type the responses in a summarized paragraph(s). If all the pertinent information from the Questionnaires is included in the FCRB report, then the Questionnaire does not need to be attached to the report but will remain in the child's electronic case file.

## **Incorporating Written or Recorded Testimony**



All written and recorded testimony will be documented under the section titled, **OTHER INFORMATION PROVIDED FOR TODAY'S REVIEW:**

As the author you have discretion to convey the written or recorded testimony in one of two ways:

- Verbatim using start and end quotes; or
- Summarize as you deem appropriate.

### **Best practices:**

- Ensure that each written or recorded testimony identifies who submitted it.
- If written testimony is submitted via email and is written in complete sentences, you can cut and paste the testimony directly into the FCRB report. Minor edits can be made such as correcting spelling.
- If a date is available of when the testimony was written or recorded, include the date. This can be important, especially if the statement was provided several days in advance of the review. Sometimes new information comes to light closer to the review date so it's necessary to show a timeline.
- If written testimony does not contain complete sentences, contains many abbreviations and/or grammar is not done well, the Facilitator should summarize the written testimony.

Examples are:

Sally Jones (Mother) submitted the following information via email dated 04/23/18:

Tim Sullivan (FSRP provider) submitted the following recorded message on 04/24/18:

Key factors to remember are: writing clear and concise documentation of the testimony provided for each review; and ensuring the narratives are easily understandable to readers, especially those who were not able to attend the review.

## Barriers to Achieving the Permanency Goal

In the past, lead questioners were given the task of completing a Barriers to Permanency Worksheet on their cases. This practice is no longer in effect as of July 1, 2018.



Towards the conclusion of the questioning, the lead questioner (with some assistance from the facilitator) will ask the parties what barriers exist that are preventing the case from moving toward the permanency goal. This will allow for additional input from the parties and will be documented in the FCRB report. There is a concise list for each case type that is in the report template.

- Barriers to reunification, transfer of custody or guardianship
- Barriers to finalizing the adoption
- Barriers to a successful transition to adulthood for APPLA cases

Board Members will enter into a discussion with the interested parties and may contribute their own thoughts of barriers that exist. The facilitator will document the barriers in the report by entering an X in the table for any identified barrier.

Documenting barriers in the FCRB report provides an opportunity for:

- FCRB Members to make recommendations to address or alleviate the barriers.
- Judges, DHS and interested parties to have this information on a case by case basis as they continue with case planning and make decisions about the best interest of the child(ren).

## Recommendations

The culmination of the findings, testimony and identified barriers provides the basis for the Board's recommendations. Recommendations are *suggestions* as to the best course of action by someone regarding a specific task.



In order for recommendations to be measurable, it is best to follow this framework when writing the recommendations:

Who      does What      by When

### Status of Prior FCRB Recommendations:

If these key elements are followed when writing the recommendations, it makes it easier for the Board to review and provide a status update at the subsequent review for each prior recommendation.

Use consistent statuses throughout each report. Options include, but are not limited to:

Achieved

Continues

Ongoing

Notr

Not Achieved

In Process

Withdrawn

applicable

**New Recommendations:**

Any recommendations that are continued from the previous review need to be included in the New FCRB Recommendations. While they are not “new”, they are recommendations that are made again for the current reporting period. By including the continued recommendations as “new”, they remain in the report for the next review so a status check can be conducted.

**Pitfalls to avoid:**

- **Inconsistent formatting:** Don’t mix “The FCRB recommends, the Board recommends, and direct recommendations without a preamble.” A recommendation section should not be written as follows:

**For DHS Case Manager:**

- FCRB recommends DHS provide a copy of the CPP for the next review.
- The Board recommends the DHS case manager attend the next review or submit a written update in the event attendance is not possible.
- To make the referral for the youth’s psychological evaluation before the next court hearing.

There is no one way to begin the recommendations but we do want consistent formatting for the report and since the recommendations fall under the heading of **NEW FCRB RECOMMENDATIONS**, there does not seem to be a need to start each one with “The Board” or “FCRB”.

**Resolution:**

One example of consistency as compared to the above example is as follows:

**For DHS Case Manager:**

- To provide a copy of the CPP for the next review.
- To attend the next review or submit a written update in the event attendance is not possible.
- To make a referral for the youth’s psychological evaluation before the next court hearing.

- **Telling vs. Recommending:** When recommendations are formatted using words like “you” and “your” it is no longer a recommendation but a directive or the Board is telling someone to do something. It is not the Board’s role to *tell* or *direct* people to carry out a particular task.

**For Ms. Jones (mother):**

- The Board recommends you make an appointment for your substance abuse evaluation and follow any recommendations from the evaluation.
- The Board recommends you consistently attend all of your visits with your children to show your commitment to working on reunification with them.

**Resolution:**

**For Ms. Jones (mother);**

- To make an appointment for the court ordered substance abuse evaluation and follow any recommendations from the evaluation.
- To consistently attend all visits with her children and demonstrate a commitment to working on reunification with them.



Key factors to remember when writing the Board’s recommendations are to identify who is to do what by when; don’t tell, recommend; and prompt Board Members to make recommendations to address any findings answered with “No” or “Unknown” or barriers identified for the case.

## Finalizing the FCRB Report

There are a few important steps to remember to do as you finalize your reports.

- Spell & Grammar Check your reports – although this check doesn't catch all errors, it does eliminate misspellings and often catches missing words or misused words.
- Naming the document – please ensure the document name includes the correct date of the review. This helps to safeguard that the reports are appropriately identified and can be cross-referenced with the agenda.
- Use the Report Essentials Checklist from the FCRB Policy and Procedures manual which will be updated and available July 1, 2018.  
[https://childadvocacy.iowa.gov/sites/default/files/documents/2017/06/resource\\_43\\_fcrb\\_report\\_essentials\\_june\\_2017.pdf](https://childadvocacy.iowa.gov/sites/default/files/documents/2017/06/resource_43_fcrb_report_essentials_june_2017.pdf)

### **Timeline for reports:**

- Email reports to your assigned editor by the designated due date.
  - Contract facilitators have 5 calendar days
  - Staff facilitators have 5 business days
  - Volunteer facilitators have 5 business days
- If reports have corrections or proposed changes that need to be made, ensure changes are made using the Accept or Reject Track Changes. See the P&P Staff Resource for more information on how to use the Word Track Changes feature.  
[https://childadvocacy.iowa.gov/sites/default/files/documents/2017/06/resource\\_staff\\_2\\_word-track\\_accept\\_reject\\_changes\\_editing.pdf](https://childadvocacy.iowa.gov/sites/default/files/documents/2017/06/resource_staff_2_word-track_accept_reject_changes_editing.pdf)
- **Final reports are due to the local Administrative Assistant by the 12<sup>th</sup> calendar day post-review.** CC: editor and local coordinator, where applicable. This confirms to everyone that the reports are ready for distribution. This also give the local coordinator an opportunity to read the reports to know what happened at the reviews.



## Confidentiality: Cases that require separated reports

There are cases that require different review scheduling in order to accommodate a no-contact order or dynamics surrounding sibling cases. Administrative Assistants (AA) make every effort to schedule cases accordingly.



### No-Contact Orders

When a no-contact order is in place, separate reviews need to be held for each parent. This requires a report to be written for each parent.

- Mother's report should only contain information about her and the children.
- Father's report should only contain information about him and the children.

If the no-contact order is between the parent and child, consult your coordinator on best practice as each case may differ in how the no-contact order reads as to whether or not report information can be shared between parties.

### Older Youth with Younger Siblings

Youth, ages 14+, are invited to reviews and receive a copy of the report. Due to the need to protect the confidentiality of younger siblings, a separate report needs to be written for each youth who is 14 years old or older. It is not known what youth do with the reports and who might gain access to them; therefore, it is important to protect sibling and family information as much as possible.

Every effort will be made to give older youth his/her own time slot in order to facilitate the best review and report possible. Due to time constraints, it may not always be possible to schedule a separate time slot for an older sibling. In those cases, separate reports will still be written but reimbursement is per time slot, not report.



### **Siblings with different parent**

When siblings have different parents we should strive to hold separate reviews for children in order to protect the confidentiality of the siblings. Due to time constraints this may not always be possible; however, separate reports should still be written even if the sibling group is reviewed together. Remember, FCRB provides a copy of the report to parents and we want to maintain confidentiality as best as possible by not sharing information with persons who have no legal ties to the child who is reviewed.

### **Recap**

This training covered a lot of key areas and issues that facilitators must pay attention to as you carry out the FCRB facilitation responsibilities. Important things to remember are, but not limited to:

- New report templates go into effect on July 1, 2018. No old report formats will be accepted. There is no “grandfathering” in of prior cases that have been reviewed.
- Findings will be reviewed with the Board Members prior to each review; this will help identify any questions from the Findings that need to be asked during the review.
- Barriers will be discussed prior to the end of testimony; facilitators will document the responses in the Board Report.
- Be mindful of how you turn testimony into narratives and strive to write the testimony by topics rather than how IPs presented the information. This will reduce repetitiveness and the content “jumping back and forth” on the issues in some cases.
- Separate reports are needed in no-contact order cases; siblings with different parents and for each 14+ year old.
- Draft reports for contractors are due within 5 calendar days; 5 business days for staff. Final reports are due to Administrative Assistants by the 12<sup>th</sup> calendar day post-review.

The work you do as a FCRB Facilitator is important and the reports you produce are essential to judicial decision making and child welfare case planning for children who come before the Boards. We will work together and strive to have professional, value-added FCRB reports.

## Facilitator Development Evaluation

Thank you for participating in this facilitator development session. Please help us improve this training for future facilitators by completing the evaluation at the following link within five business days:

<https://goo.gl/forms/sR2wBH8uptLOMmuX2>

Your feedback is greatly appreciated!

